Course Syllabus and Key Notes

Course Number BENL3089

BENEFITS ELIGIBILITY

Classroom Protocol

1. *Attendance*
2. *Housekeeping and Facility Rules*
3. *Introductions*
4. *Classroom Activity Overview*

Definitions

This section identifies new terms that will be used in the classroom.

OLD TERM (State)	NEW TERM (Edison)
Budget Code	Department Code/Position Number
SSN	National ID
Insurance Program	Benefit Plan
Coverage Type	Plan Type
Coverage Level	Coverage Code
Retirement Type and Unit Code	Employee Class

TERM	DEFINITION
BAS Activity Table	Repository of online activity that has been identified by the system as event triggers. This information is fed by online PeopleCode and manually entered events.
Benefit Plan	Benefit plans are the benefits you want to offer to your employees. Examples: • HMO1N = Cigna HMO Memphis Pre-Taxed • HMO2N = Cigna HMO Nashville Pre-Taxed
Benefit Program	Benefit programs are a set of benefits and deductions that are valid for an employee or group of employees.

TERM	DEFINITION
Benefits Administration	State of Tennessee Division who administers benefits.
Edison Benefits Administration	Edison software module for administering benefits.
Effective Dates	Using effective dates is an efficient way for you to maintain accurate records of your benefits information. You can create historical records and enter future-dated information.
Emplid	System generated employee identification number.
Employee	An insurance participant who are recognized in the Edison system for benefit administration purposes only not for payroll purposes.
Employee Class	A method used to group employees for determining eligibility.
Employee Status	The employee's status, which is based on the last personnel action for the employee or the reason for the action, such as death.
Event	Changes in an employee's personal attributes or job information
Event Class	Tells the system how and what to process. Event Class is also referred to as the BAS Action
Event ID	Number assigned by the system to events that have been processed by BenAdmin. This number helps to identify the order that events are processed.
Event Maintenance	Daily processing of events placed on the BAS Activity table.
Job Related Event	An effective-dated event relevant to the history of an individual's employment that is documented on Job Data.
Non-Job Related Event	Changes in the employee's personal or demographic information, that is unrelated to his/her job but may impact benefit eligibility or elections.
Plans	Plans are the individual benefits into which an employee may be enrolled. A plan is always subordinate to a plan type. For example, you may offer employees a choice of four different medical plans, each from a different HMO (health maintenance organization) or plan provider. In this case, you would be offering four different plans in the medical plan type. Each plan has an associated deduction code, set of rates, and calculation rules.
Plan Types	Plan types are essential in a benefit program. They group individual plans or options that may be elected by an employee for a particular type of benefit, such as basic life insurance or medical.

Changes to the State of Tennessee Benefit Processing

Role	Description
External Agency Benefits Coordinator	Person responsible for performing employee orientation. The Agency Benefits Coordinator will also collect, validate and forward benefit enrollment forms to Benefits Administration. Agency Benefit Coordinators will do more analysis and less data entry: they will respond to routine inquiries and direct employees to vendors or the Benefits Administration Service Center for information and questions.
Benefits Administration Analyst	Person responsible for entering family status changes (FSC) and Medical Underwriting enrollments for both the external and internal agencies. Benefits Administration Analysts will also be responsible for adding dependent demographic information. The Benefits Administration Service Center will be staffed with current Division of Insurance personnel plus additional positions. The Benefits Administration Service Center will become the central point of contact for employee benefits questions.

Key Note:

Benefit Enrollments will be processed centrally:

- Insurance

Module Discussion(s)

Edison, an Enterprise Resource Planning (ERP) system, is an integrated software package that is used to perform administrative business functions such as financials and accounting, payroll, benefits and personnel administration. This course will focus on the role an External Benefits Coordinator plays in the benefit administration process.

Edison Benefits Administration works in conjunction with **Edison** Human Resources. It uses the employee information that is entered and tracked in the **Edison** Human Resources module to populate benefit information such as name and addresses. This system tracks an employee's life cycle from original hire to termination. All changes and information entered into the **Edison** Human Resources module are reflected in an employee's benefit plan.

The Benefits Eligibility course will provide Coordinators with the necessary tools to process various transactions for the non-central state employee population. The following topics will be discussed:

- Searching for an Employee by National ID
- Hiring a New Person
- Adding an Employment Instance
- Correcting National IDs
- Updating Personal Information
- Entering a Job Change of Termination
- Viewing Benefit Summary Information
- Viewing the Benefit Program Participation Page
- Viewing Employee Job Summary Information
- Viewing Employee Summary Data Information
- Viewing Employee Health Benefit Elections
- Viewing the Deduction Balances Page
- Viewing Queries

Course Lesson 1: Processing New Hires

Topic Discussion

After you have entered a worker's basic personal information and created one or more organizational instances for them, other pages within the Workforce Administration menu can be used to add and track a broad range of additional information for that person.

This lesson will walk you through the necessary steps needed to successfully hire a person into the **Edison** system. When processing a new hire some of the following scenarios may occur:

- Duplicate National IDs
- Existing Emplid's

Prior to processing a new hire you must conduct a National ID search to determine if the person already exists in the system. This will prevent multiple records for the same person. National IDs are associated with employees as well as dependents and beneficiaries. You can use the National ID to locate an individual's records. The Search by National ID page will enable you to search for an individual record, based on the National ID.

Key Notes:

- HR Specialists will be responsible for processing new hires for the Payroll population and Benefits Administration Analysts and External Agency Benefits Coordinators will be responsible for processing new hires for the Benefits Payroll population (for insurance purposes).
- When hiring a new employee, for the Benefit Payroll population, you will need to select the following action/reason: **HIRE/X – Benefits Employee Hire** or **HIRE/X – Benefits Higher Educ Empl**. When you select an action that makes changes to an employee's data, you could be changing the employee's status. An employee's status is not user-selected. It is derived (or set) based on a selected action. This is important because a change in an employee's status can affect their benefits.
- **New Process**: All enrollment applications will need to be faxed to Benefits Administration for processing.
- **Edison** is not the system of record for beneficiaries. Participants will need to continue to provide correct beneficiary information to the applicable 3rd party administrator.

- When executing the hire a person process take note of the following:
  - On the **Biographical Details Tab**, the employee birth date field is required.
  - On the **Biographical Details Tab**, the system will default the Gender field to “Unknown”. You **must** select a gender from the list. Failing to select a gender could prevent various processes from running successfully.
  - On the **Biographical Details Tab**, you must select a valid value from the Marital Status drop down list.
  - On the **Organizational Relationships Tab**, most times, the Employee option should be selected however if processing a Survivor, the Person of Interest (POI) option should be selected. A Survivor is a dependent that becomes the Head of Contract due to the death of the employee.
  - On the **Work Location Tab**, an Action and a Reason must always be selected.
  - On the **Work Location Tab**, the Job Indicator field will most times be set to “Primary Job” however, if an employee has an additional employment instance, this field may be set to “Secondary Job”.
  - On the **Work Location Tab**, based on the Position Number entered, the system will default the following fields:
    - Company
    - Business Unit
    - Department
    - Location
    - Establishment ID
  - Each Agency will have their own individual Position Numbers.
  - On the **Compensation Tab**, the Comp Rate value that should be used is $50,000 for everyone except: State Affiliated Agencies and UT/TBR, where the actual salary will need to be entered.
  - All fields with an asterisk are required.
  - During the Hire process, there could be instances when a user overwrites the delivered employee ID or saves job data in error. If this occurs, it is recommended that the following process is followed: Call and email the Central **Edison** Benefits contact so the employee ID can be deleted. Once confirmed, the hire process can be executed from the beginning.

Activities

1. Search by National ID
2. Hire a New Employee
3. Adding an Employment Instance
4. Correcting National IDs

Exercises

1. Hire a New Employee

Self-Assessment

1. Hire a New Employee
    - Validating Zip Codes (**Discussion Only**)
2. Adding an Employment Instance
3. Correcting National IDs

Course Lesson 2: Viewing Employee Summary Information

Topic Discussion

The **Benefits Summary** page will allow you to view: the benefit plan in which the employee is enrolled, the plan type, the coverage, the coverage begin date, the pay end date and the last deduction taken.

The **Benefit Program Participation** page will allow you to: view an employee's benefit status, view the benefit program in which an employee is enrolled and the effective date in which the employee was enrolled in the specific benefit program and view the **Edison** Benefits Administration eligibility fields.

The **Job Summary** page consists of four tabs: General, Job Information, Work Location and Compensation.

- The **General** tab displays information such as: job changes (i.e., hire, pay rate change or promotion), the effective dates of these changes and the Action Reason.
- The **Job Information** tab displays information such as: employee type (i.e., salaried) and an employee's status.
- The **Work Location** tab displays information such as: an employee's position, an employee's department ID and an employee's pay group.
- The **Compensation** tab displays information such as: an employee's annual and monthly salary rates.

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The **Employee Summary Data** page will enable you to view the following information: an employee's benefit status, payroll status, pay group, company, employee type, business unit and original hire date.

Activities

1. Viewing Benefits Summary Information
2. Viewing the Benefit Program Participation Page
3. Viewing Employee Job Summary Information
4. Viewing Employee Summary Data Information

Exercises

None

Self-Assessment

None

Course Lesson 3: Identifying Event Triggers

Topic Discussion

When changes are made to an employee's personal or job record information, **Edison** Benefits Administration is automatically notified. This is referred to as an Event Trigger. Employee data changes are the most common event triggers. Job events such as: hire and termination are triggered automatically through changes in an employee's employment record. Some non-job events, such as a change in postal/state code are also triggered automatically. These event triggers occur because the underlying changes can affect an employee's eligibility for benefits.

The two types of event triggers that will be discussed are:

- Job related (i.e., entering a job change of termination)
- Non-job related (i.e., updating an employee's address)

Key Notes:

- Agency Benefits Coordinators will update participant personal data.
- A "**Home**" address is required for all employees.
- All correspondences will be sent to employee's home addresses.

Activities

1. Updating Personal Information
2. Entering a Job Change of Termination

Exercises

1. Updating Personal Information
2. Entering a Job Change of Termination

Self-Assessment

1. Updating Personal Information
2. Entering a Job Change of Termination

Course Lesson 4: Viewing Employee's Health Benefits Information

Topic Discussion

Use the Health Benefit Elections page to view an employee's benefit history information. Information you will be able to view includes: coverage begin date, benefit plan elected, coverage code elected, election date and the deduction begin date.

Activities

1. View Health Benefit Elections

Exercises

None

Self-Assessment

None

Key Notes:

- The Health Provider ID field will be used to track pre-existing conditions.
- Checking the Previously Seen checkbox denotes that the employee has a pre-existing condition. Both the text value in the Health Provider ID field and the Previously Seen checkbox must occur for the information to be reported to the applicable vendor.
- The Option Code field is a number that is assigned to each benefit plan.

Course Lesson 5: Viewing Payroll Information

Topic Discussion

The Deduction Balances page enables you to review an employee's deduction balances. You may find it necessary to review an employee's deduction balances.

Activities

1. Viewing the Deduction Balances Page

Exercises

None

Self-Assessment

None

Course Lesson 6: Viewing Queries

Topic Discussion

PeopleSoft Query is a reporting tool that enables data to be written directly on the screen and enables the creation of one-time ad-hoc queries.

Activities

1. Running a Query

Exercises

None

Self-Assessment

None

Course Review with Question and Comments

Questions and Comments

Evaluation